



The Association of
Accountants and
Financial Professionals
in Business

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Employment News

Please contact [Bob Shapiro](#) if you have a job available or if you are looking for an employment opportunity.

Dear Akron IMA,

Please join your fellow IMA Members for Guest Night on Wednesday, May 15, 2019 at the HILTON GARDEN INN, 1307 E. MARKET ST., AKRON, OH 44305. **RSVP deadline is Friday, May 10th. Please see directions in the "Registration Changes" article.**

Check in starts at 5:15 pm. Dinner will be served at 5:45 p.m. sharp. Cost for Members is \$25.00. Non-members pay \$30.00. Pre-Technical Session begins at 6:10 p.m. Technical Session begins at 7:10 p.m. Cost is \$0.00 if you are not having dinner. 2 CPE credits this month. Student members always pay \$10 for dinner.

Please forward newsletter items to: [IMA Newsletter](#).

Thanks!
Kelly Heil

President's Message

Thank you, Akron chapter members! As the chapter year winds up I just want you to know that it has been a pleasure serving as president for the 2018-2019 chapter year. But you all should know that none of the meetings or information that you receive would be possible without the excellent board of directors that this chapter has. I look forward to seeing many of you at the May "Guest Night" meeting on the 15th and the professional development seminar on the 22nd. I hope you can make it to one or both of them.

Joe Richards
IMA President
2018-19



Welcome New Members

Date Joined	Name	Occupation
3/04/2019	Piyushi Sharman	Transfer In

2018-2019 Meeting Schedule

Regular meetings for 2018/2019 will be the following:

- May 15, 2019 – “Guest Night”

Registration Changes

Meeting registrations can now go through the chapter website:

<http://akron.imanet.org/>

Directions are available by clicking on “[All Discussions](#)” in the green Menu Bar toward the top of the page.

If you have any issues, please contact us at akron@imachapter.org.

All registrants will sign a waiver for their picture to be posted on social media, should the opportunity present. If you wish to “opt-out”, you will have the ability to do so at the sign-in table. Your privacy is our concern!

May Dinner Meeting

Hilton Garden Inn

May 15, 2019

Guest Night

Agenda:

Registration opens at 5:15pm

Buffet Dinner at 5:45pm

Pre-Tech Session begins at 6:10pm

Technical Session begins at 7:10pm

Pre-Tech Session - "Training - A Full Staff Project"

Aaron Dahnke, CAE

Education Manager, Natural Stone Institute

Aaron Dahnke is currently the Education Manager for the Natural Stone Institute and is responsible for leading the association’s education and training programs which include: Stone-related training at major industry tradeshows, The Natural Stone Institute/Stone World regional education program, delivery of CEU credits to the design community, and resources from the association bookstore. Aaron is also currently involved in The Natural Stone Institute's Chapter program.

Before joining the Natural Stone Institute, Aaron managed the Center for Nonprofit Advancement’s (Washington DC) education program. While at the Center for Nonprofit Advancement, Aaron’s duties included building an educational curriculum for the nonprofit community, which included over 100 educational classes a year. In conjunction with the Washington DC Mayor’s Office, Aaron also managed the yearly D.C. Public Private Partnership Conference, which provided day-long nonprofit educational training for the region.

Aaron currently resides in Westlake and is a graduate of Ohio University, where he earned both Bachelor's and Master's degrees. He also received his Certified Association Executive (CAE) designation from the American Society of Association Executives in 2015.

Technical Session - "ESOPs: A Tax-Advantaged Business Succession Planning Vehicle"

Greg M. Daugherty

Partner, Porter Wright Morris & Arthur LLP

Greg Daugherty focuses his practice on executive compensation and employee benefits matters for publicly traded and privately held companies and nonprofit organizations. He has extensive experience assisting business owners with their succession planning needs through the implementation of employee stock ownership plans (ESOPs).

Greg's executive compensation and employee benefits experience consists of assisting employers with design implementation, and compliance issues related to qualified and nonqualified retirement plans, stock and non-stock based incentive programs, employment agreements, severance agreements, and change-in-control and parachute agreements. He provides advice relate to ERISA fiduciary and 409A compliance and strategic planning, including advising companies on compensation and benefits issues in connection with mergers, acquisitions, and spinoffs. Greg also assists employers with benefit plan correction programs offered by the Department of Labor and Internal Revenue Service.

Greg's ESOP experience consists of assisting companies with the design and implementation of ESOPs and representing companies in stock purchase transactions involving the company, sellers, and the ESOP. Greg also assists both companies and lenders in connection with loans made to ESOP-owned companies. He provides ongoing counsel to ESOP-owned companies, assisting with ERISA fiduciary questions and with the implementation of incentive compensation arrangements that facilitate an employee ownership culture.

Greg received a JD (with honors) from The Ohio State University Michael E. Moritz College of Law and a Bachelor of Science (*summa cum laude*) from Miami University. He is a member of the Ohio Bar. His professional associations include The ESOP Association, Ohio Employee Ownership Center, American Bar Association, and the Columbus Bar Association (Pension Advisory Committee and Chair 2011-2013 of the Employee Benefits Committee). Greg has been designated an "Ohio Super Lawyer, Rising Stars Edition".

Among Greg's community associations are St. Christopher Parish (Young Professionals Group), Kiwanis Club of Columbus, Columbus Young Professionals Club, and Officer 2009-2013 with Miami University Alumni Association.

Perfect Attendance for 2018-2019

Through the March technical session meeting, 8 members have "Perfect Attendance" (6 meetings to date): Ken Bechtol, Linda Garrison, Wayne Hawkins, Don Mullen, Joe Richards, Bob Shapiro, Roy Howarter, and Linda Simko.

The following 7 chapter members have missed 1 meeting: Shirley Calvin (September), Kelly Heil (March), Doreen Kuster (January), Sherri McGuinness (September), Kerstin Peters (September), Russ Tietz (October), and Wendy Tietz (October).

The following 3 chapter members missed 2 meetings: Billy Dreyer (October and March), Christine Niswender (November and April), and Mary Ruyten (October and March).

Up to two missed meetings can be made up by obtaining (via akron@imachapter.org) and listening to tapes of the missed meetings (or by viewing the speaker's handouts if no recording is available), or by attending another chapter's meeting before the end of May. Some chapter members have already obtained the makeup materials from Linda Simko. Don't miss the May meeting to keep your Perfect Attendance record intact.

Job Opportunities

Velosio has over 35 opportunities available both locally and nationwide. Careers can be viewed and applied on-line at: <https://www.velosio.com/careers/>

Careers | Velosio



Careers. We work hard and our efforts pay off – our industry accolades, 99% success rate and 97% client retention rate are proof of our hard work, dedication and commitment to excellence.

www.velosio.com

Contact Bob Shapiro should you have any questions. rshapiro@velosio.com

Program Book Link

Check out the web-based program book for the 2018-2019 year! It is available on the chapter website (akron.imanet.org) using the About Chapter -> Program Book navigation. Or, use this link: <https://akron.imanet.org/aboutchapter/aboutchapter-program-book>

Bylaws Review

Please note that the Board of Directors has made some changes to the by-laws of our chapter. We will need to take a vote (majority decision) at the May 15th meeting as to whether or not to adopt these as the official by-laws of the chapter or whether we need to make some changes. Please take a few minutes to review the bylaws on our chapter website:

<https://akron.imanet.org/aboutchapter/chapter-bylaws>

Monthly Chuckles

Thanks to Ken for this month's jokes:

- What do accountants suffer from that ordinary people don't? Depreciation.
 - Why are accountants always so calm composed, and methodical? They have strong internal controls.
 - Be audit you can be.
 - What do you call a financial controller who always works through lunch, takes two days' holiday every two years, is in the office every weekend, and leaves every night after 10 PM? Lazy.
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Open Board of Directors Positions for 2019-2020

Attention Akron chapter IMA members: we are now looking for a few additional Board members for the next fiscal year (Board position marked "OPEN" below). Note that if you serve on the Board for five years, you will qualify for reduced dues as an ELM (Emeritus Life Member) when you retire. Serving as a chapter Board member is a volunteer position that doesn't involve a huge time commitment. If interested in volunteering, please contact Joe Richards at akron@imachapter.org.

Position	Member Name
Associate Director, Employment	OPEN
Director, Program Booklet	OPEN
Associate Director, Program Booklet	OPEN

Director, Advertising	OPEN
Associate Director, Public Relations	OPEN
Director, Special Activities	OPEN
Director, Young Professionals Committee	OPEN
Director, Retired Professionals	OPEN
Coordinator - Brown Mackie College	OPEN

CMA Mentoring Program

The IMA Akron Chapter is proud to offer its members a mentoring program to assist CMA candidates with strategies to pass the CMA exam. The IMA Akron CMA Mentoring Program will encourage networking and provide career development opportunities designed to help CMA candidates (mentees) and other members (mentors) in our chapter to form valuable mentoring relationships. The success of this program will rely on volunteers to serve as mentors. Mentoring can take place online, by phone, or in person at Akron chapter events or other locations.

Mentees and mentors will be matched based on the needs of the mentee and the availability of the mentors. The ideal mentor for this CMA focused program would be an individual who has obtained the CMA certification and / or who has recently passed one or both parts of the newer two part CMA exam structure. All individuals who are currently enrolled in the CMA program and studying for the CMA exam are encouraged to enroll as a mentee. In addition, individuals who are undecided about obtaining the CMA certification and would like additional information or guidance are encouraged to enroll.

The CMA Designation - The CMA (Certified Management Accountant) is the advanced professional certification specifically designated to measure the accounting and financial management skills that drive business performance. Achieving the CMA credential demonstrates your mastery of financial planning, analysis, control, and decision support, as well as professional ethics.

If you would like more information, please contact: Jeff Falter at akron@imachapter.org

Internet References

Dinner Reservations, Newsletter articles, Employment service, IMA insurance: akron@imachapter.org

Akron chapter website: akron.imanet.org

IMA Global website: www.imanet.org

Login: enter user name (your IMA account number)

Enter password (last name, unless you changed your password)

Ohio Council website: www.ohio.imanet.org

Access online recording of chapter meetings:

Contact the chapter board members at akron@imachapter.org